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## South Africa, Republic of

### Fresh Deciduous Fruit

### Annual

### 2006

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**Report Highlights:**

South Africa's 2005/6 apple and pear production is expected to increase by about 10% and 5%, respectively, and with improved quality because of enough rain and sunlight. The table grape industry expects production also to increase by 6% and to improve in quality.

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Includes PSD Changes: Yes  
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Annual Report  
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[SF]

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**Executive Summary**

South Africa's 2005/6 apple and pear production is expected to increase by about 10% and 5%, respectively, and with improved quality because of enough rain and sunlight. The table grape industry expects production also to increase by 6% and to improve in quality.

The industry was still awaiting approval of formal crop estimates from the regional Crop Estimation Committees when this report was compiled.

**Production**

The Western Cape experienced an unusually cold winter in June and then warmth in July, which broke the dormancy patterns, resulting in uneven ripening and lower total production especially for stone fruits. However, the pome fruit (apples and pears) experienced enough water and sunlight in production regions around the Langkloof areas.

## Production Subcategory

South Africa, Republic of Apples, Fresh							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/Y YYY
Area Planted	23720	23720	22000	22000	0	21500	(HA)
Area Harvested	19170	19170	18400	18400	0	18000	(HA)
Bearing Trees	17250	17250	16540	16540	0	16180	(1000 TREE S)
Non-Bearing Trees	4100	4100	3880	3880	0	3800	(1000 TREE S)
Total Trees	21350	21350	20420	20420	0	19980	(1000 TREE S)
Commercial Production	724500	769309	706000	658940	0	725000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
<b>TOTAL Production</b>	<b>724500</b>	<b>769309</b>	<b>706000</b>	<b>658940</b>	<b>0</b>	<b>725000</b>	<b>(MT)</b>
TOTAL Imports	2	2	0	0	0	0	(MT)
TOTAL SUPPLY	724502	769311	706000	658940	0	725000	(MT)
Domestic Fresh Consump	181004	181004	175000	180016	0	185000	(MT)
Exports, Fresh Only	305664	305664	285000	226614	0	290000	(MT)
For Processing	237834	282643	246000	252310	0	250000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
<b>TOTAL UTILIZATION</b>	<b>724502</b>	<b>769311</b>	<b>706000</b>	<b>658940</b>	<b>0</b>	<b>725000</b>	<b>(MT)</b>

South Africa, Republic of Apple Juice, Concentrated							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Deliv. To Processors	237834	282643	246000	252310	0	250000	(MT)
Beginning Stocks	0	0	0	0	0	0	(MT)
Production	33680	39500	35000	35323	0	35000	(MT)
Imports	3000	3000	3100	3100	0	3000	(MT)
<b>TOTAL SUPPLY</b>	<b>36680</b>	<b>42500</b>	<b>38100</b>	<b>38423</b>	<b>0</b>	<b>38000</b>	<b>(MT)</b>
Exports	15500	18000	16150	16200	0	16100	(MT)
Domestic Consumption	21180	24500	21950	22223	0	21900	(MT)
Ending Stocks	0	0	0	0	0	0	(MT)
<b>TOTAL DISTRIBUTION</b>	<b>36680</b>	<b>42500</b>	<b>38100</b>	<b>38423</b>	<b>0</b>	<b>38000</b>	<b>(MT)</b>

In 2005/6, South Africa's deciduous fruit industry is expected to deliver a slightly lower volume of fresh apples to the juice processing plants because of improved quality that results in more sales in the fresh markets.

South Africa, Republic of Pears, Fresh							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Area Planted	14200	14200	12700	12700	0	12000	(HA)
Area Harvested	10150	10150	9000	9000	0	8520	(HA)
Bearing Trees	10570	10570	9360	9360	0	8860	(1000 TREES)
Non-Bearing Trees	5930	5930	5240	5240	0	4980	(1000 TREES)

Total Trees	16500	16500	14600	14600	0	13840	(1000 TREES)
Commercial Production	308000	342835	303000	328631	0	345000	(MT)
Non- Comm. Production	0	0	0	0	0	0	(MT)
<b>TOTAL Production</b>	<b>308000</b>	<b>342835</b>	<b>303000</b>	<b>328631</b>	<b>0</b>	<b>345000</b>	<b>(MT)</b>
TOTAL Imports	0	0	1	1	0	0	(MT)
TOTAL SUPPLY	308000	342835	303001	328632	0	345000	(MT)
Domestic Fresh Consump	45170	45152	46000	49642	0	50000	(MT)
Exports, Fresh Only	139045	139045	130000	153646	0	170000	(MT)
For Processing	122284	157137	125500	123843	0	124000	(MT)
Withdrawal From Market	1501	1501	1501	1501	0	1000	(MT)
<b>TOTAL UTILIZATION</b>	<b>308000</b>	<b>342835</b>	<b>303001</b>	<b>328632</b>	<b>0</b>	<b>345000</b>	<b>(MT)</b>

South Africa, Republic of Grapes, Table, Fresh							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[ New]	USDA Official [Old]	Post Estimate[Ne w]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Area Planted	19200	19200	19250	19250	0	19000	(HA)
Area Harvested	12200	12200	12500	12500	0	12000	(HA)
Commercial Production	328500	328500	285795	303734	0	322750	(MT)
Non- Comm. Production	0	0	0	0	0	0	(MT)

<b>TOTAL Production</b>	<b>328500</b>	<b>328500</b>	<b>285795</b>	<b>303734</b>	<b>0</b>	<b>322750</b>	<b>(MT)</b>
TOTAL Imports	551	551	500	500	0	500	(MT)
TOTAL SUPPLY	329051	329051	286295	304234	0	323250	(MT)
Domestic Fresh Consump	29927	29920	30000	26810	0	32000	(MT)
Exports, Fresh Only	237244	237244	190000	211129	0	222750	(MT)
For Processing	61880	61887	66295	66295	0	68500	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
<b>TOTAL UTILIZATION</b>	<b>329051</b>	<b>329051</b>	<b>286295</b>	<b>304234</b>	<b>0</b>	<b>323250</b>	<b>(MT)</b>

### Consumption

South Africa's total local consumption of deciduous fruit is expected to increase by about 2.8% for apples, by 19% for table grapes, and slightly for pears, because of an increase in total production.

### Trade

South Africa's 2005/6 total exports are expected to increase to reach 290,000 MT for apples, 170,000 MT for pears, and 222,700 MT for table grapes. Prices for exports for 2005/6 are expected at a slight increase from a year earlier because of improved quality.

South Africa's 2005/6 apple and pear exports started about two weeks early and were average in size.

The following are major ports for apples and pear exports:

<b>LOADING PORTS</b>	<b>APPLES (% load in 2005)</b>	<b>PEARS (% load in 2005)</b>
Cape Town	11	9
Port Elizabeth	89	91
Durban	Less than 1	0

Source: DFPT

In 2005/6, South Africa's exports of table grapes are expected as follows:

Region	Expected Table grapes exports (million cartons)	Expected Table grapes exports (MT)
Northern Province	3.25	14,625
Northern Cape	14.75	66,375
Bergriver	13.5	60,750
Hex	18	81,000
<b>Total</b>	<b>49.5</b>	<b>222,750</b>

Source: South African Table grapes Association

In 2004/05, table grape exports amounted to 211,163 MT, a 11% decrease from 237,244 MT of 2003/04.

### Trade Subcategory

Tables below show exports for January to October 2005:

Apples, Fresh						
Time Period	Jan-Oct					
Exports for:	2004		2005		% change	% change
	MT	US\$ MIL.	MT	US\$ MIL.	MT	US\$
U.S.	1,158	0.701	111	0.061	-90.39	-91.28
Others						
U.K.	106,477	73.4	104,477	65.6	-1.8	-10.7
Netherlands	30,757	15.9	24,150	12.5	-21.4	-22
Malaysia	19,653	7.9	19,769	9.9	0.5	25
Belgium	21,181	12.2	14,557	9.0	-31.2	-26.7
France	9,614	3.4	8,892	3.4	-7.5	-2.17
U.A.Emirates	7,762	4.5	7,370	4.8	-5	4.9
Singapore	5,788	2.1	6,289	3.3	8.6	52.9

Benin	4,329	2.2	5,530	3.4	27.7	52.5
Germany	11,905	6.6	4,979	2.8	-58.1	-65.6
Mauritius	4,591	2.2	4,542	2.0	-1	-10.9
Angola	4,006	2.7	4,381	2.8	9.3	3.5
Reunion	2,628	1.5	4,215	1.5	60.3	-6.8
Saudi Arabia	5,477	3.6	4,058	2.9	-25.9	-17.8
Canada	6,238	3.9	3,472	2.	-44	-47.4
<b>Total for Others</b>	<b>220,773</b>	<b>142.1</b>	<b>216,681</b>	<b>125.9</b>		
<b>Others not Listed</b>	<b>77,569</b>	<b>32</b>	<b>41,835</b>	<b>23.7</b>		
<b>Grand Total</b>	<b>298,342</b>	<b>174.2</b>	<b>258,516</b>	<b>149.6</b>	<b>-13.3</b>	<b>-14.1</b>

Source: WTA

Pears, Fresh						
Time Period	Jan-Oct					
Exports for:	2004		2005		% change	%change
	MT	US\$ MIL.	MT	US\$ MIL	MT	US\$
U.S.	972	0.625	341	0.242	-64.9	-61.2
Others						
Netherlands	36,113	18.7	31,310	18.9	-13.3	1.7
U.K.	23,402	18.9	29,984	19.9	16.9	4.8
Belgium	22,616	11.7	23,779	16.2	5.1	37.9
France	7,284	3.2	8,507	3.3	16.8	26.6
Germany	7,217	3.8	8,305	4.1	15.1	9.2
Malaysia	4,291	2.2	5,592	4.2	30.3	43.8
Russia	7,406	3.3	4,331	2.2	-41.5	-31.8
Canada	3,745	2.3	3,740	2.0	-0.1	-13.4
Italy	3,449	2.2	3,417	2.2	-0.9	-2.7

U.A.Emirates	1,011	0.9	1,988	2.3	96.7	25.4
Singapore	2,462	1.1	3,169	2.0	28.7	67.2
<b>Total for Others</b>	<b>118,996</b>	<b>68.925</b>	<b>124,122</b>	<b>77.3</b>		
<b>Others not Listed</b>	<b>19,809</b>	<b>9.575</b>	<b>18,639</b>	<b>10.6</b>		
<b>Grand Total</b>	<b>138,805</b>	<b>78.5</b>	<b>142,761</b>	<b>87.9</b>	<b>2.8</b>	<b>11.9</b>

Source: WTA

Table grapes, Fresh						
Time Period	Jan-Oct					
Exports for:	2004		2005		% change	%change
	MT	US\$ MIL.	MT	US\$ MIL	MT	US\$
U.S.	2,558	2.96	1,185	1.2	-53.67	-59.2
Others						
Netherlands	82,823	102.7	68,965	90.8	-16.7	-11.6
U.K.	36,015	39.1	34,237	48.6	-4.9	24.4
Belgium	31,223	32.5	30,022	38.7	-3.8	19.1
Germany	15,549	15.4	12,752	6.5	-17.9	-6.1
Hong Kong	5,863	5.5	5,066	3.9	-13.5	16.9
Russia	4,425	4.3	3,366	3.8	-23.9	-10.3
U.A.Emirates	2,315	2.4	3,099	3.5	33.8	61.9
Canada	3,497	3.9	2,985	3.8	-14.6	-10.6
Portugal	2,306	2.7	2,887	3.1	25.2	41.9
France	3,925	3.4	2,727	2.8	-30.5	-9.8
<b>Total for Others</b>	<b>190,449</b>	<b>211.9</b>	<b>167,291</b>	<b>221.2</b>		
<b>Others not Listed</b>	<b>21,358</b>	<b>25.3</b>	<b>18,809</b>	<b>19.7</b>		
<b>Grand Total</b>	<b>211,857</b>	<b>237.2</b>	<b>186,100</b>	<b>240.9</b>	<b>-12.1</b>	<b>1.57</b>

Source: WTA

## Policy

Export Standards and Requirements for Apples 2005 can be accessed at;  
[http://www.deciduous.co.za/special%20exports/export\\_stan\\_apples.htm](http://www.deciduous.co.za/special%20exports/export_stan_apples.htm)

The updated industry MRL guidelines released by October 2005 can be accessed at;  
<http://www.deciduous.co.za/trade%20and%20market/trade.htm>

## Policy Subcategory

South Africa's Deciduous Fruit Production industry, led by Optimal Agricultural Business Systems (OABS), derived a new methodology for crop estimates to ensure consistency in the industry data. This new strategy resulted from concerns by the National Ports Authority of South Africa about congestion in Cape Town's Container Terminal that causes delays for all

port users. OABS identified the major cause for the delays as inefficiency in the logistical processes due to lack of relatively accurate crop estimates.

The methodology is based on previous studies from Australia, the US, and South Africa. Estimations are expected to have less than 5% deviation from actual figures and will be based on historical actual production; estimated new plantings, fruit set information from technical experts, and estimated crop damages. The same approach will be used for all types of fruit with added specifications only when necessary.

The process of methodology will follow three stages. The first estimates, mainly theoretical, will reduce the impact of natural or seasonal deviations using a three-year average of actual intake inspection information is used as base estimates. The first estimates will be released as official.

The second estimates will be conducted a month later with more details and certainty about fruit set and sizes where applicable. It will then be approved by the regional crop estimate committee, which are comprised of farmer representatives, exporters, and PPECB officials.

Consecutive estimates will be determined by the seasonal production period, and will compose of a total number of estimates per fruit types.

The ARC, DFPT, and the International Atomic Energy Agency are funding research about sterile insect technique (SIT) for Codling Moth between Canada and South Africa in pome fruit (apples and pears). It is indicated that South Africa's mild conditions makes it one of the highest infested globally. For more information, please go to [www.deciduous.co.za](http://www.deciduous.co.za)

## **Marketing**

The deciduous fruit industry indicates that the 2004/5 season was difficult because of lower export revenues and distorted shipping patterns to Europe. South Africa's Apple exports were affected by strong competition from Argentina, Chile, and New Zealand during their peak season.

## **Marketing Subcategory**

South Africa's deciduous fruit industry established other Special Export Programs with Mexico, Taiwan, and Israel (only table grapes).